

# GRANTEE CONVENING

## RISK. AGILITY. RESILIENCE.

September 7–9, 2016 / Washington, DC

### Wednesday, September 7, 2016

**8:00–9:00 AM**  
**Shaw Foyer**  
(Meeting Level 3)

#### **New Grantee and New Staff Orientation Registration**

All attendees must check in at the registration desk before proceeding into the meeting room.

**9:00 AM–5:00 PM**  
**Shaw/LeDroit Park/  
Chinatown**  
(Meeting Level 3)

#### **New Grantee and New Staff Orientation**

Please see detailed orientation agenda if you are attending on Wednesday.

### Thursday, September 8, 2016

**8:00–9:00 AM**  
**Liberty Foyer**  
(Meeting Level 4)

#### **Main Convening Registration**

All attendees must check in at the registration desk before proceeding into Liberty – Salons IJKL.

**9:00–10:30 AM**

#### **Opening Plenary: Course Correction and Agility**

**Liberty - Salons IJKL**

##### **Welcome Remarks:**

**Asim Mishra, Chief of Staff, CNCS**

##### ***The Evidence, Engagement, and Equity Continuum:***

The Social Innovation Fund (SIF) recognizes that our success depends on the ability of our grantees and subgrantees to replicate or expand proven solutions to our nation's challenges. As we work together to scale evidence-based programs, data continue to show that race, gender, income, and neighborhoods are each major predictors of whether children graduate from high school, become incarcerated, how healthy they are, and even how long they will live.

As funders, our orientation to data and evidence is critical and inextricably linked to our approaches and commitment to the pursuit of equitable outcomes for the populations that we seek to impact.

How are our approaches to evaluation rooted in equity? How do we engage and listen to communities authentically? What is the institutional and individual work required to respond to the gross inequities (evidenced by racial, gender, and geographic disparities) in the communities that we serve?

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This conversation will explore practices as well as tensions in ensuring that our frameworks for evidence, engagement, and equity are intentionally interconnected and that our interventions and strategies explicitly seek to redress structural inequities in local communities.

Marcus Littles, Senior Partner with Frontline Solutions, will moderate a discussion on effective strategies that allow us to reimagine the roles and responsibilities of leaders, partners, and funders—ultimately leading to stronger and more responsive communities.

**Moderator:**

**Marcus Littles**, *Senior Partner*, Frontline Solutions

**Panelists:**

**Ruth Ann Norton**, *President & CEO*, Green & Healthy Homes Initiative

**Kathy Park**, *CEO*, National Council on Crime and Delinquency

**Stacey Stewart**, *U.S. President*, United Way Worldwide

**10:30–10:45 AM**

**Break**

**10:45 AM–12:15 PM**

**Concurrent Sessions: Course Correction and Agility**

**Capitol**

**Session 1—Creating a Subgrantee Learning Environment to Increase Impact**

To borrow loosely from an old proverb, “If you want to fail fast, go alone; if you want to go far, go together.” From in-person meetings to technology-driven group discussions, we’ll explore techniques and tools to ensure that you and your subgrantees are consistently sharing insight with one another to improve your programs. Our learning environment framework will help all types of intermediaries, whether they have a network of subgrantees across the nation or have a cohort of subgrantees around a single geographic focus area. In addition, we’ll help you overcome the challenges encountered by subgrantees that may face capacity constraints that prevent their engagement in a learning and sharing environment and how their productivity and impact can go far when they go together.

**Facilitator:**

**Lori Strauss**, *Program Manager*, AARP Foundation

**Panelists:**

**Hannah Betesh**, *Senior Associate*, Social Policy Research Associates

**Carolyn Das**, *Project Coordinator*, Santa Fe College

**Mary Gunn**, *Executive Director*, Generations Incorporated

**Dave Handy**, *Director, Field Services*, AARP Foundation

**Peg Walton**, *AACC Consultant BACK TO WORK 50+*, American Association of Community Colleges/AARP Foundation

### Supreme Court

## **Session 2—Stay the Course (and Correct Along the Way): Designing and Implementing Supportive Housing Initiatives for Vulnerable Individuals and Families**

Through both SIF Classic and SIF Pay for Success (PFS), Corporation for Supportive Housing is working with communities that are advancing enhanced supportive housing models, which combine health, housing, and social services to improve outcomes for homeless frequent users of crisis and acute care. All of these initiatives involve significant planning work, including data analysis, target population identification, intervention and evaluation design, and identification of outcomes. Both during the initiative design process and during implementation, unexpected challenges can occur. This interactive session will identify common challenges and innovative solutions that can be used to reshape various project components to move forward toward a finalized project with partners that achieves positive results.

### **Facilitator:**

**Stephanie Mercier**, *Associate Director*, Corporation for Supportive Housing

### **Panelists:**

**Sarah Gallagher**, *Director*, Corporation for Supportive Housing

**Sarah Gillespie**, *Research Associate*, Urban Institute

### Archives

## **Session 3—Checking the Side Mirrors**

Exploring a complex PFS project requires continually adapting to new and changing conditions to design a model that succeeds in attracting investment while benefitting families being served. The Green & Healthy Homes Initiative (GHHI) and its partners will present a series of lessons learned for “checking the side mirrors.” PFS project partners cannot rely on the “rear view mirror” for deep reflection on evaluation results but instead must conduct ongoing adaptive “lane changes” to continue to move the project ahead.

GHHI and its partners will present examples and lessons learned for checking the side mirrors, including building new relationships across siloes, tinkering with successful program design, and launching into a pilot as a “road test.”

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The session will include an interactive break-out component in which participants will consider their biggest adaptive challenges and complete a template, based on the lessons learned, for prioritizing actions to monitor the need and conduct for "midcourse corrections."

**Facilitator:**

**Michael McKnight**, *Vice President of Policy and Innovation, Green & Healthy Homes Initiative*

**Panelists:**

**Sarita Hudson**, *Pioneer Valley Asthma Coalition Director, Partners for Healthier Community*

**Randy Jepperson**, *Housing Director, Salt Lake County Community and Resources Development Department*

**Susan Steppe**, *Program Director, CHAMP, Le Bonheur Children's Hospital*

**Monument**

### **Session 4—Time to Pivot: Integrating Trauma-Responsive Services into Opportunity Pathways for Youth**

Recent research and emerging innovations in practice are signaling that opportunity pathways for vulnerable youth can be more attentive to adolescent brain development and the trauma-related needs of young people. Systems and practitioners that interact with youth—particularly youth in transition from foster care or involved in the justice system—need to have a solid understanding of trauma and how caring adults can help youth build resilience and succeed. This session will bring together researchers on adolescent brain development and trauma-informed practitioners to share learnings from new research and practice so that we and others might integrate these ideas into opportunity programming for youth.

The Annie E. Casey Foundation, with its partners from the Jim Casey Youth Opportunities Initiative and LEAP SIF practitioners in the field, will host an interactive dialogue focused on how to promote awareness and adoption of these ideas in your community.

**Facilitator:**

**Patrice Cromwell**, *Director of Strategic Initiatives, The Annie E. Casey Foundation*

**Panelists:**

**Dr. Mark Sander**, *Director of School Mental Health, Hennepin County Public Schools, Minneapolis*

**Dianna Walters**, *Maine LEAP Director, Muskie School of Public Service, University of Southern Maine*

### Congress

#### **Session 5—Advancing Evidence-Based Policy with Pay for Success**

The PFS exploration process drives an orientation to outcomes through connecting data to contracts and decision making. Jurisdictions face many of the same obstacles in data, resources, etc., as they work through the mechanics of measuring performance and tying payments to performance.

During this fast-paced workshop, come ready to share your challenges with implementing evidence-based policy and hear how subgrantees have addressed similar issues in the PFS framework.

Subgrantees will discuss their progress with integrating evidence-based initiatives, and Third Sector will share its strategies to align the priorities of governments and providers. Applying lessons and solutions learned from the field can, and should, accelerate the transition to evidence-based policy.

**Moderator:**

**Celeste Richie**, *SIF Director*, Third Sector Capital Partners, Inc.

**Presenters:**

**Nadia Ahmed**, *Pay for Success Project Lead*, Third Sector Capital Partners, Inc.

**Elizabeth Whalley Buono**, *Co-Founder*, Virginia Pay for Success Council

**Joshua Ogburn**, *Director*, University of Virginia Pay for Success Lab

### Treasury

#### **Session 6—Common Outcomes, Common Indicators: Comparing Apples and Oranges to Show Portfolio-wide Impact**

This session will provide a critical look at how local conditions necessitated letting go of plans to use a promising cross-partner evaluation tool (the EDI) and prompted a midproject course correction for the United Way for Southeastern Michigan's portfolio evaluation.

It will examine how a new set of common outcomes and common indicators (COCI) was selected and review analytical approaches being used to show our portfolio's impact around these outcomes. Specific examples will be included of how our COCI and new portfolio analysis (minimum detectable effect) is supported by our existing Subgrantee Evaluation Plans. The interactive session will close with an examination of what the impacts have been on our organization's ability to better plan and adapt to similar evaluation challenges.

**Facilitator:**

**Jeffrey Miles**, *SIF Manager*, United Way for Southeastern Michigan



**Panelists:**

**Lindsey Miller**, *SIF Data Specialist*, United Way for Southeastern Michigan  
**Dr. David Murphey**, *Senior Research Scientist*, Child Trends  
**Dr. Ty Partridge**, *Associate Professor of Psychology*, Wayne State University

Mint

### **Session 7—A Conversation with the SIF Director and Grantee CEOs\***

SIF CEOs will meet with Lois Nembhard, the Acting SIF Director, where they will have an open conversation to support progress with their current work and provide ideas for the future.

**Facilitator:**

**Lois Nembhard**, *Acting Director*, SIF  
\*CEOs Only

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**12:15–1:30 PM**  
**Liberty – Salons IJKL**

### **Lunch: Risk and Field Disruption**

***Strategies to Catalyze Innovation While Also Learning What Works:***

What strategies can organizations use to catalyze innovation internally and to harness new ideas from outside? What lessons do innovative organizations provide to others? And how can organizations advance both innovation and evidence-based policy by testing out innovative approaches to see if they work? We get insights on all of these questions through a discussion with experts in public sector innovation. The session will include a moderated discussion, audience Q&A, and an opportunity for small group brainstorming about how SIF grantees might apply some of these concepts to their own organizations.

**Moderator:**

**Andrew Feldman**, *Visiting Fellow*, Center for Children and Families, Brookings Institution

**Panelists:**

**Carla Javits**, *President & CEO*, REDF  
**Thomas Kalil**, *Deputy Director for Technology and Innovation*, White House Office of Science and Technology Policy  
**Olga Acosta Price**, *Director*, Center for Health and Health Care in Schools; *Associate Professor*, Milken Institute School of Public Health, George Washington University  
**Shrupti Shah**, *Managing Director*, GovLab, Deloitte Consulting  
**Bryan Sivak**, *Entrepreneur-in-Residence*, Robert Wood Johnson Foundation  
**David Yokum**, *Director*, The Lab @ DC, Mayor's Office

**1:30–2:15 PM**  
**Liberty - Salons MNOP**

### **Networking Session: Ask Me About.... Tell Me About....**

An important part of attending conferences is meeting and learning from new people. Each Convening attendee possesses valuable experience and expertise that should be shared. The goal of this session is to identify everyone's areas of expertise and then connect attendees to learn from one another.

Equally important, for this session you will also identify topics that you would like to know more about. The "Ask Me About...Tell Me About..." networking session is your chance to be expert for a day and, hopefully, to have a vexing question answered!

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**2:15–3:45 PM**

### **Concurrent Sessions: Risk and Field Disruption**

**Mint**

#### **Session 1—Paving a Path for Pay for Success in Healthcare**

By 2024, \$1 in every \$5 spent in the United States will be on healthcare. With almost half of that spending projected to be done by federal, state, and local governments, it is more important than ever that they innovate and scale programs that work. Delivery and payment reform efforts are well underway in multiple states, but PFS has not yet been formally integrated into healthcare policies and practices. In this interactive session, participants will hear from the Robert Wood Johnson Foundation, GHHI, and Social Finance, which will discuss the importance of PFS to the healthcare field and their progress to date working with federal and state Medicaid offices and Medicaid health plans around how to successfully implement PFS.

Together, presenters and all participants will dive into the specific challenges of healthcare PFS projects—particularly those involving Medicaid—and discuss pragmatic solutions to take to healthcare policy makers to fully unlock the potential of PFS in healthcare.

**Facilitator:**

**Trent Van Alfen**, *Social Innovation Specialist*, Green & Healthy Homes Initiative

**Panelists:**

**Nancy Barrand**, *Senior Adviser for Program Development*, Robert Wood Johnson Foundation

**Ruth Ann Norton**, *President & CEO*, Green & Healthy Homes Initiative

**Tracy Palandjian**, *CEO & Co-Founder*, Social Finance

### Monument

## Session 2—Outcomes-Based Financing in Place-Based, Early Childhood Initiatives

Children’s environments can significantly influence educational and health outcomes. Inadequacy and instability put children at greater risk of poor academic, social, and economic outcomes, but there are unanswered questions on how a child’s social determinants of health—the conditions that influence well-being and quality of life—influence brain development and long-term outcomes. Increased understanding of the interconnectedness among these factors will inform policy, urban planning, and design that better support population health and well-being.

We must think collectively and systemically to improve outcomes for vulnerable children and their families. We hypothesize that it is possible to use PFS or other outcomes-based financing to scale the continuum of high quality early childhood interventions within the context of place-based initiatives. It is critical to learn and share at the nexus of early childhood development, place-based efforts, and PFS financing. This panel aims to do just that.

### **Facilitator:**

**Megan Golden**, *Senior Fellow & Director of Pay for Success Financing*, Institute for Child Success

### **Panelists:**

**Mary Garvey**, *Associate Director for PFS Financing*, Institute for Child Success

**Patsy Hampton**, *Senior Associate*, Center for the Study of Social Policy

**Dr. David Willis**, *Director*, Division of Home Visiting and Early Childhood Systems HRSA, U.S. Department of Health and Human Services

### Capitol

## Session 3—Consumer-Oriented Services – How to Be Inclusive and Responsive to Consumers

As a service provider, your ability to establish and maintain a trusting relationship with consumers is no small task. Whether the organization is a healthcare provider, nonprofit, financial institution, government agency, or a different entity, our goal is to meet the needs of those in our communities. Though we are all mission driven and highly attuned to details like “the bottom line,” we are often challenged to incorporate input from those benefiting from our services into our decision-making processes. How do we know that the work we do every day is making a difference to those in our communities? How can we ensure that our organization is offering services at optimum efficiency and effectiveness to meet consumers’ needs?



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In this interactive session, we will identify and explore the various ways organizations are engaging community members to inform and drive decision making within their practices. Participants will engage in interactive exercises to explore the various aspects of consumer engagement, hear stories from the presenters, and collaborate with panelists and attendees to develop new ideas and identify opportunities for consumer engagement within their own work.

**Facilitator:**

**Stephanie Tapia**, *Research Analyst*, Methodist Healthcare Ministries

**Panelists:**

**Sonya Lewis**, *Senior Program Administrator*, Youthprise

**Martín Ornelas**, *Director*, Rural Economic Assistance League, Inc.

Congress

### **Session 4—Transforming Mental Health Services: How Community-Driven Approaches Can Inform Funding Strategies**

One in four adults—approximately 61.5 million Americans—experiences mental illness in a given year. Three SIF intermediaries support varied interventions that deliver mental health services. Methodist Healthcare Ministries stimulates local solutions that improve physical and behavioral health. John A. Hartford Foundation funds community health clinics to implement the Collaborative Care model, a depression care model that doubles the benefits of usual depression treatment. The Mayor’s Fund to Advance New York City’s Connections to Care (C2C) grant builds the capacity of social service organizations to better meet the mental health needs of the low-income individuals they already serve.

This session will explore how implementation and evaluation lessons from these initiatives can inform decisions by local, state, and national policy makers. The panel will be valuable for audience members who are focused on mental health and for a broader audience interested in learning how thoughtful programs and policy can expand the capacity of social service systems to address widespread barriers to opportunity.

**Facilitator:**

**Tom Morris**, *Associate Administrator*, Office of Rural Health Policy, Health Resources and Services Administration, U.S. Department of Health and Human Services

**Panelists:**

**Rebecca Brune**, *Senior Vice President of Strategic Planning and Growth*, Methodist Healthcare Ministries

**Jessica Cotton**, *CEO*, Southwest Montana Community Health Center

**Sinead Keegan**, *Social Innovation Fund Director*, Mayor's Fund to Advance

NYC/Center for Economic Opportunity **Heidi Schultz**, *Program Officer*, Helmsley Charitable Trust

**Treasury**

### **Session 5—Beyond the Deal... The Community and Organizational Benefits of Participating in a Pay for Success Feasibility Analysis**

The presenters in this session represent organizations that have deep experience leading communities and service provider organizations through PFS feasibility.

While the theories of change and mechanics of PFS feasibility vary among the intermediary organizations represented, each has developed a growing and rich catalog of “but for” status quo disruptions. These are instances where the very process of exploring PFS feasibility resulted in positive status quo disruption within a government or service provider organization—a disruption that would not have occurred but for the PFS feasibility work.

The University of Utah's Sorenson Impact Center will facilitate this presentation of PFS feasibility-generated status quo disruptions that span issue areas and geographies. The presentations will focus on the SIF and non-SIF PFS feasibility work of the Impact Center, Corporation for Supportive Housing, Institute for Child Success, National Council on Crime and Delinquency, and Harvard Kennedy's Government Performance Lab.

**Facilitator:**

**Katie Reberg**, *Program Manager*, Sorenson Impact Center, University of Utah

**Panelists:**

**Gloria Gong**, *Director of Knowledge and Innovation*, Harvard Kennedy's Government Performance Lab

**Stephanie Mercier**, *Associate Director*, Corporation for Supportive Housing

**Deirdre O'Connor**, *Associate Director for Strategic Initiatives*, National Council on Crime and Delinquency

**Sara Peters**, *Senior Policy Associate*, Sorenson Impact Center, University of Utah

**Joe Waters**, *Executive Vice President*, Institute for Child Success

### Supreme Court

## Session 6—Transition Coaching: An Intrusive Community-Based Approach to Fostering Postsecondary Success

Too many students stumble on the way through college, stumped by personal, financial, or administrative challenges. Boston Coaching For Completion—the one-on-one transition coaching at the core of the city’s larger college completion initiative—is filling a critical gap in student support needs through an innovative model based on cross-sector collaborations with community-based organizations, colleges, and universities. Early evidence shows that coaching is working; its recent three-fold expansion documents the strong student appetite for it. Yet, in our collective efforts to grow the program and make it resilient, challenges are inevitable, but so are opportunities. This session will foster a deep conversation among partners in this work about the value of transition coaching and the challenges and opportunities that come with sustaining it at a large scale—especially in a post-SIF environment.

### **Facilitator:**

**Eric Esteves**, *SIF Director*, The Boston Foundation

### **Panelists:**

**Liliana Mickle**, *Special Assistant to the Vice Provost*, Academic Support Services and Undergraduate Studies, The University of Massachusetts Boston  
**Joel Mora**, *Manager of College and Career Success*, Hyde Square Task Force  
**John Griffin**, *SIF Program Associate*, The Boston Foundation

### Archives

## Session 7—Risk and Reward in Collective Philanthropy

Struggling to meet the SIF match requirement? Do you wish your local funders worked collectively to move the needle in your community? Collective action is enhanced through collective philanthropy. Learn how United Way of Greenville County (South Carolina), the Community Foundation of Greenville, and Hollingsworth Funds convened local funders to pool resources to meet the SIF match requirement for subgrantees in the OnTrack Greenville initiative. In addition to securing match funding, the collection of funders created Greenville Partnership for Philanthropy, whose vision is to maximize the impact of philanthropy in Greenville, South Carolina, by connecting grant makers of diverse backgrounds and experience to share and increase knowledge, improve practice, and pursue opportunities for positive change. Attendees will hear and understand how to navigate the treacherous waters of relationships, politics, and funding; the mechanics of collective funding and dedicated facilitation; and lessons learned.

### **Facilitator:**

**Tobi Kinsell**, *Director*, OnTrack Greenville, United Way of Greenville County

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**Panelists:**

**Ted Hendry**, *President*, United Way of Greenville County

**Katy Smith**, *Facilitator*, Greenville Partnership for Philanthropy

**3:45–4:00 PM**

**Break**

**4:00–5:00 PM**

**Concurrent Sessions**

**Sessions 1–6: Workgroup Meetings**

In grantee-led discussions, the workgroups will host their in-person September meetings.

**Capitol**

**Session 1—Compliance Workgroup**

**Monument**

**Session 2—Economic Opportunities Workgroup**

**Mint**

**Session 3—Evaluation Workgroup**

**Congress**

**Session 4—Healthy Futures Workgroup**

**Supreme Court**

**Session 5—Pay for Success Workgroup**

**Treasury**

**Session 6—Youth Development Workgroup**

**Archives**

**Session 7—The Sub Experience (Subgrantees only)**

For first or last year subgrantees and subrecipients, there are always questions and best practices to share with your peers. Come join your SIF subgrantee/subrecipient peers in discussing successes and challenges. Join an in-depth conversation about being part of SIF, and come ready to share successful methods of managing your SIF grant.

**Facilitators:**

**Nicky Martin**, *Manager*, Education Northwest

**Justine Murray**, *Senior Principle*, JBS International

### Friday, September 9, 2016

**9:00–10:30 AM**  
**Liberty - Salons IJKL**  
(Meeting Level 4)

#### **Plenary: Risk with Responsibility**

Despite all that we know about what it takes to build strong and responsive programs, we still have much to learn about what kinds of support organizations need to move the needle on national and local challenges. As we seek to share learnings that will be useful to the full range of organizations we support, Melissa Bradley will moderate a discussion with the leaders of our 2010 grant awards on the inherent risks of the work our grantees undertake and the responsibility placed on them to undergo rigorous evaluation and scale their innovative programs.

The panelists will discuss the impact that the SIF award had on their organization, the risks they were able to take because of the additional funding, and how they have managed to replicate and expand programs to serve more people. We will also hear about new trajectories that their SIF award put them on.

#### **Moderator:**

**Melissa Bradley**, *Executive Director*, American University Center for Innovation

#### **Panelists:**

**Carol Thompson Cole**, *President & CEO*, Venture Philanthropy Partners (VPP)  
**Kevin Jordan**, *Senior Vice-President for National Programs*, Local Initiatives Support Corporation (LISC)  
**Susan Zepeda**, *former President & CEO*, Foundation for a Healthy Kentucky

**10:30–10:45 AM**

**Break**

**10:45 AM–12:15 PM**

#### **Concurrent Sessions: Risk with Responsibility**

##### **Sessions 1–2: Social Innovation Fund Grantee Evaluation Briefs**

After all the effort involved in conducting a rigorous evaluation, dissemination may feel like an afterthought. But translation and dissemination are just the first steps down the path of utilizing the evaluation's results, and ultimately, toward fostering program and policy improvement. These sessions will update stakeholders on the evaluation findings of grantees and the impact of their programs.



### Archives

### Session 1—HIV/AIDS

AIDS United's Access to Care (A2C) initiative was conceived for people living with HIV/AIDS to increase their access to and retention in effective healthcare and support services. In collaboration with Johns Hopkins University (JHU), AIDS United conducted a single, multipart evaluation of the 12 subgrantee programs. In this session, JHU's Cathy Maulsby will present the results and discuss findings of the completed evaluation.

**Facilitators:**

**Cathy Maulsby**, *Associate Scientist*, Johns Hopkins University Department of Health, Behavior, and Society

**Melissa Werner**, *Senior Program Manager*, AIDS United

### Monument

### Session 2—Workforce Development

The Mayor's Fund to Advance NYC/Center for Economic Opportunity, Jobs for the Future/National Fund for Workforce Solutions, and Local Initiatives Support Corporation (LISC) will share findings from their recently released evaluations and discuss policy implications for workforce development across the country.

**Facilitators:**

**Rick Hendra**, *Senior Associate*, MDRC

**Sinead Keegan**, *Social Innovation Fund Director*, Mayor's Fund to Advance NYC/Center for Economic Opportunity

**Seung Kim**, *Senior Program Director*, LISC

**Navjeet Singh**, *Deputy Director National Fund for Workforce Solutions*, Jobs for the Future

### Congress

### Session 3—Maximizing Impact and Minimizing Risk: Subgrantee Planning and Monitoring

The effectiveness of your subgrantee management is only as good as your subgrantee policies and procedures and your ability to actually follow your established protocols. In this session, we'll identify the four major phases of subgrantee management—internal guideline development, selection, monitoring, and close out—and focus on the preparation your organization needs to have in place with each of these phases. We'll detail how you can (and why you should) establish subgrantee policy and procedures before you even select the subgrantees; we'll share policies, procedures, and monitoring tools; and we'll incorporate feedback from the audience to identify best practices.

Whether you just received your first SIF award or you are a seasoned SIF intermediary, this session will identify new ways you can minimize risk (internally and externally) to focus on maximizing impact with your subgrantees.

**Facilitator:**

**Marc McDonald**, *Director of Grants Management*, AARP Foundation

**Panelists:**

**Joanna Wald**, *Monitor & Compliance Manager*, AARP Foundation

**Amber Talburt**, *Grants Management Analyst*, AARP Foundation

Mint

### Session 4—Playing the Long Game on a Complex and Changing Field: Sustaining Innovation

Healthcare innovations are often well known before payment mechanisms to support them are established. Primary care clinics, especially those serving low-income patients, need support developing and implementing financial sustainability plans for healthcare innovations not supported by Medicaid and other funders. This is especially true in rural areas, where health disparities are exaggerated and where clinics often have fewer funding sources.

As part of the IMPACT initiative to disseminate evidence-based behavioral health services into community primary care, the AIMS Center implemented a multipronged technical assistance program to help rural clinics develop customized financial sustainability plans to sustain care at the end of SIF funding. Clinics received support across multiple domains, including clinical productivity, contracting with payers, credentialing behavioral health providers, coding, and claims.

The first cohort of clinics completed their grants in June. Data were collected before and after financial sustainability support and these data will be presented.

**Facilitator:**

**Virna Little**, *Senior Vice President*, Psychosocial Services and Community Affairs, UW AIMS Center and Institute for Family Health

Supreme Court

### Session 5—Disruption Driving Impact: How the Social Innovation Fund Is Shifting “Business as Usual” in Early Education

Mile High United Way, Silicon Valley Community Foundation, and United Way for Southeastern Michigan are each engaging SIF with the goal of improving early literacy and school readiness.

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This session will focus on how youth development intermediaries, and subgrantees from California, Colorado, and Michigan are disrupting normal practices to adopt, adapt, and promote national early literacy/developmental readiness programs focused on school readiness to improve child outcomes. The session will examine what disruptions can look like at multiple levels within organizations and systems, and we will explore the types of conditions and processes that facilitate these disruptions. Audience members will come away with a better understanding of how current conditions in their systems may be ripe for disruption and the type of approaches that may be appropriate to attempt.

**Facilitator:**

**Jeffrey Miles**, *Social Innovation Fund Manager*, United Way for Southeastern Michigan

**Panelists:**

**Marisol Cruz**, *Program Manager*, Mile High United Way

**Avo Makdessian**, *Director*, Center for Early Learning, Silicon Valley Community Foundation

**12:15–12:30 PM**

**Break**

**12:30–2:00 PM**

**Liberty – Salons IJKL**

### **Lunch: Technology to Scale Change and Increase Impact**

Designing for Financial Empowerment (DFE) is a cross-sector collaboration between the NYC Department of Consumer Affairs Office of Financial Empowerment, Center for Economic Opportunity, the Mayor's Fund to Advance New York City, Citi Community Development, and the Parsons DESIS Lab to explore how service design can be used to make public sector financial empowerment services more effective and accessible.

In this session, Parsons DESIS lab faculty members David Colby Reed and Lee-Sean Huang will discuss how DFE has collaborated across sectors and directly with communities in New York City to co-design interventions for improving public services, such as the city's free financial counseling and tax preparation services. They will explain the value of service design methodologies coupled with community engagement and discuss how they could be adapted to other sectors and social issues.

**Presenters:**

**Lee-Sean Huang**, *Lecturer and Affiliated Faculty*, School of Design Strategies, Parsons School of Design

**David Colby Reed**, *Lecturer and Affiliated Faculty*, School of Design Strategies, Parsons School of Design

**2:00–3:00 PM**  
**Liberty - Salons MNOP**

### **Networking Session: If I Had Known Then...**

A critical part of the annual SIF Convening is to share lessons learned and discuss previous experiences with fellow grantees.

Prior to this session, you will have a chance to provide suggested topics. During the session, you can join different discussions that interest you. This session is intended to be a group discussion, versus the one-on-one interactions in Thursday's "Ask Me About.... Tell Me About...." networking session.

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**3:00–3:30 PM**  
**Liberty - Salons IJKL**

### **Leadership Remarks**

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**3:30–5:00 PM**

### **Concurrent Sessions: Technology to Scale Change and Increase Impact**

**Mint**

#### **Session 1—Garbage In Garbage Out (GIGO) is No Go: Ensuring Quality in Your Data Management System**

Without data, most of our programs will not get funded because they cannot be measured. As a result, significant investment is made into data systems to capture information that can be analyzed and shared. But, how do you ensure that you and your subgrantees are entering data correctly and timely? This session will highlight tools and processes to maintain accurate data and will review a critical component to keep data accurate—demonstrating data's value to the subgrantee. By engaging subgrantees throughout the process and providing them with useful and actionable data analysis, they are more invested in the entire data management process. After this session, you'll have the skills and tools necessary to prevent your worst case data scenario: garbage in, garbage out.

**Facilitator:**

**Marc McDonald**, *Director of Grants Management*, AARP Foundation

**Panelists:**

**Carolyn Das**, *Project Coordinator*, Santa Fe College

**Mary Gunn**, *Executive Director*, Generations Incorporated

**Stephanie Okpala**, *Performance Management Analyst*, AARP Foundation

**Shannon Rolf**, *Program Analyst*, AARP Foundation

### Congress

## Session 2—Using Technology to Track Service Provider Performance

We all understand why service providers should deliver outcomes effectively and efficiently. When it comes to how, the devil is in the data.

This session will demonstrate to audience members two examples of how GHHI and its service recipients use technology to track service provider performance against predetermined targets in real time. Presenters will not only demonstrate how these systems work, but also explain the details behind how each was set up, piloted, and maintained. This session should be attractive to a wide range of SIF grantees and subgrantees who are interested in learning about different ways in which service providers can use technology to enhance service delivery.

### **Facilitator:**

**Kevin Chan**, *Social Innovation Specialist*, Green & Healthy Homes Initiative

### **Panelists:**

**Susan Steppe**, *Program Director*, CHAMP, Le Bonheur Children's Hospital

**Randy Jepperson**, *Housing Director*, Salt Lake County Community and Resources Development Department

### Archives

## Session 3—At Risk to On Track: Using Data and Collaboration to Impact Student Success

Data. Four little letters that can be your greatest friend or biggest obstacle. OnTrack Greenville, a collaborative partnership between United Way of Greenville County and Greenville County Schools, did not let the typical obstacles surrounding the use of student data prevent them from collaborating to do what is best for students. Serving as the foundation of the initiative, Greenville County Schools built a sophisticated business intelligence solution also known as an early warning data dashboard that identifies students at risk for not graduating on time by tracking student attendance, behavior, and grades in real time. Using a collective impact approach, United Way of Greenville County—serving as the backbone organization—and subgrantees work collaboratively with school faculty and staff to customize multitiered, evidence-based interventions for students and families to address the root causes of chronic absenteeism, behavior issues, and failing grades.

### **Facilitators:**

**Tobi Kinsell**, *Director*, OnTrack Greenville, United Way of Greenville County

**Jason McCreary**, *Director of Accountability and Quality Assurance*, Greenville County Schools



### Capitol

### Session 4—Managing Your SIF Grant: Real Challenges, Real Resources

All SIF grantees are faced with putting new systems and processes into place or revising existing systems when they receive their SIF award. SIF grantees will demonstrate valuable resources that they have developed to assist in managing their grant, enhancing their program, and increasing their impact. In addition to brief demonstrations, the grantees will talk about why they developed the resource, how it has enhanced their program, any adjustments they have made, and finally any lessons learned along the way.

#### **Facilitators:**

**Patricia Arty**, *Development Manager-Foundation & Government Relations*, U.S. Soccer Foundation

**Laura D'Alessandro**, *Program Officer*, LISC

**Javier Ruales**, *Programs Associate*, U.S. Soccer Foundation

**Rebecca Tallarigo**, *Social Innovation Fund Specialist*, United Way for Southeastern Michigan